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ABSTRACT

This document summarizes presentations and discussions on school consolidation that took place at the 1994 Rural Education Conference held at Western Montana College. The summaries cover the following: (1) a panel discussion on the politics of school consolidation (influences on public opinion, need for balance between state and local control, and school finance issues); (2) "An Overview of the Pros and Cons of School Consolidation," by Paul Theobald; (3) "Forces Supporting Consolidation and Some Alternatives," by Paul Theobald; (4) a panel discussion by school superintendents on changing roles at the county level; (5) a workshop on ideas and options for change that might work in participants' schools; (6) a presentation on the pros and cons of unification of Montana's elementary and secondary school districts; (7) other views on consolidation (college-school collaboration, misconceptions associated with consolidation, cost savings, need for local decision making, and school-community relationships); and (8) some concluding thoughts (on accountability and public responsiveness) by former Montana governor, Ted Schwinden. Contains the conference agenda, lists of presenters and participants, and related resources available from the Rural Education Center. (SV)

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"LOOKING THE DRAGON IN THE EYE: School Consolidation Pros & Cons"

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16th ANNUAL
RURAL EDUCATION CONFERENCE
JUNE 22-24 1994

Conference Summary and Resource Guide

Rural Education Center
Western Montana College
of The
University of Montana
Dillon, Montana 59725-3598

The University of Montana
Western
Montana College

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INTRODUCTION & ACKNOWLEDGEMENTS

The topic for the 16th Annual Rural Education Conference, LOOKING THE DRAGON IN THE EYE--SCHOOL CONSOLIDATION, PROS AND CONS, was chosen based on a survey sent to rural educators last fall. Many people volunteered to participate as panelists. In fact, the presentations and the presenters were outstanding. Pros and cons were definitely presented.

As the time for the conference drew near, more and more people called and said that they could not attend or that they were attending, but that they really wanted a summary of what was presented at the conference. This was a new idea for the Rural Education Conferences. However, because of the timeliness of the topic, it was determined that a summary would be done.

Lisa Boka, a Senior in English at Western, agreed to attend the conference, audiotape the sessions, take notes and write the summaries. She did a wonderful job, though it was more time consuming than had originally been envisioned. The presenters were all sent draft summaries of their sections and asked to respond with changes within a certain time period. Many did provide good clarifications.

The task of putting the document together fell into the capable hands of Phyllis Anderson, the Rural Education Center's Administrative Assistant. As usual, she did a first rate job.

Finally, sincere appreciation should go to Susan Jones and her staff in Continuing Education and Summer School who made sure that all the conference logistics were met and who paid for the creation of this document.

It is hoped that the reader of this summary can find, as did the participants in the conference, that it is difficult to look the dragon in the eye. The school consolidation dragon has many eyes because the schools in Montana are so varied. As several presenters concluded, there is no one solution to school consolidation because there is so much variety in Montana's schools and each situation should be looked at for its own unique qualities. However, along with the recognition that any plan must take into account the diversity found in public education in Montana, it was generally agreed (to use Governor Schwinden's terms) that schools must be responsive to their public, provide accountability and regain the public trust.

Dr. Claudette Morton, Director
Rural Education Center

CONFERENCE AGENDA

WEDNESDAY, JUNE 22

Opening Session **THE POLITICS OF SCHOOL CONSOLIDATION**

Panelists:

Eric Newhouse, Editorial Editor of *The Great Falls Tribune*
Loran Frazier, Executive Director of the School Administrators of Montana
Paula Butterfield, Superintendent of Bozeman Public Schools and a member of the Governor's Task Force to Renew Montana Government
Eric Feaver, President of the Montana Education Association and a member of the Governor's Task Force to Renew Montana Government
Bob Anderson, Executive Director of the Montana School Boards Association

Moderator - **Dr. Alan Zetler**, Professor Emeritus and Research Consultant at Western

BANQUET

Welcome - **Dr. Claudette Morton**, Director, Rural Education Center

Introduction of Speaker - **Dr. Sheila Stearns**, Chancellor of Western Montana College of The University of Montana

Address, "An Overview of the Pros and Cons of School Consolidation" - **Dr. Paul Theobald**, Assistant Professor at South Dakota State University at Brookings

THURSDAY, JUNE 23

Continental Breakfast

Table Topics

K-8 Issues -- John Babcock, Superintendent, Cayuse Prairie Elementary (Kalispell), Facilitator

Small K-12 District Issues -- Carl Knudsen, Superintendent, Saco School District, Facilitator

County Superintendents' Issues--Dottie Donovan, Beaverhead County Superintendent of Schools, Facilitator

Guest Speaker Address "A More In-Depth Examination of Some of the Forces Supporting Consolidation and Some Alternatives", **Dr. Paul Theobald**

Panel Presentation -- **CHANGING ROLES AT THE COUNTY LEVEL**

Panelists:

Rachel Vielleux, Missoula County Superintendent of Schools
Jerry Scott, Carbon County Superintendent of Schools
Mary Ann Brown, Gallatin County Superintendent of Schools
Dorothy Laird, Flathead County Superintendent of Schools and a member of the Education Committee of the Governor's Task Force to Renew Montana Government

Moderator - **Dr. Lee Spuhler**, Professor Emeritus and Co-Director of Field, Clinical & Student Teaching Experiences at Western

Group Interaction Session -

IDEAS/OPTIONS FOR CHANGES -- Opportunities For Participants To Determine Changes That Might Work In Their Schools

Facilitator - **Dr. Joyce Ley**, Northwest Regional Educational Laboratory, Portland, Oregon and former Montana Educator

K-12 UNIFICATION--PROS AND CONS

Gregg Groepper, Assistant Superintendent for the Department of Operations, Office of Public Instruction, Helena
Craig Brewington, Superintendent of Hellgate Public Schools, Missoula

STEAK FRY AT BIRCH CREEK

FRIDAY, JUNE 24

Continental Breakfast

Opportunity to Network with colleagues from around the State

Panel - **OTHER VIEWS ON CONSOLIDATION**

Panelists:

George Bailey, Superintendent of Target Range Schools, Missoula

Storrs Bishop, Rancher, Insurance and Real Estate from Ennis and a member of the Education Committee of the Governor's Task Force to renew Montana Government

The Honorable Chuck Swysgood, State Senator, Senate District 37

The Honorable Kelly Elser, Mayor of Sheridan

Moderator - **Dr. Claudette Morton**, Director of the Rural Education Center and Associate Professor of Education

Final Address - **SOME CONCLUDING THOUGHTS**

The Honorable Ted Schwinden, Former Governor of Montana and author of *School Reorganization in Montana: A Time for Decision?*, a 1993 study commissioned by the Montana School Boards Association

THE POLITICS OF SCHOOL CONSOLIDATION

Eric Newhouse
Editorial Editor of The Great Falls Tribune

Bob Anderson
Executive Director of the Montana School Boards Association

Loran Frazier
Executive Director of the School Administrators of Montana

Paula Butterfield
Superintendent of Bozeman Public Schools and a
member of the Governor's Task Force to Renew Montana Government

Eric Feaver
President of the Montana Education Association and a
member of the Governor's Task Force to Renew Montana Government

Eric Newhouse, because he is in touch with the public, cited three reasons why the public is negative towards new school levies: SAT scores dropping; inadequate college preparation of students; and a general feeling of having very little control over their taxes except in voting on school levies. He mentioned how papers he has worked on have had to downgrade employee tests on journalism in order to hire. The public also feels a need to cut the fat in government which underlies their concern over administration and teacher salaries and benefits. He cited the growth in government employees, about 23% of all Montanans, and the feeling of tax payers receiving little in return for their dollars as issues contributing to a cry for consolidation. Newhouse concluded comparing private industry and its downsizing, to school consolidation which he said represents to the public more efficient use of resources including people.

Bob Anderson, is not against consolidation or any other form of educational reform, but he is against state mandated reform without research or benefit shown to support educational improvement. He stated students do better when their parents are involved with them and their education, not just reading to them, but when they feel and are empowered to help create a better school system. Those closest to the problems should be the ones who decide what's best for their children. He also said that the media should exercise more responsibility making sure that what they report is backed up with good data. He stated that the media is feeding a growing public perception that consolidation is a more cost effective

answer to maintaining the quality of education in Montana when in fact that may not be the case.

Loran Frazier, looked at where schools started, where they have been, and where they are going. He believes there is a need for some consolidation with school administrators and a need for balance in state and local control. Society as a whole wants the next generation to have it better than they did in terms of economics. He stated that research has shown children from small schools and large schools do equally well, and small school children do better in some areas in later life. He said that he believed this is due mainly to higher parent and student involvement. He also mentioned accreditation standards and building structures as playing an important role in the consolidation issue, and suggested that these issues need to be looked at closely.

Paula Butterfield, addressed the assumption that consolidation will save money or that a district will lose smaller schools when other factors like location and busing are involved. She based these assumptions on a report which outlined the costs and savings involved with consolidation of several smaller schools with the Bozeman School District. She found it would cost more to consolidate her district with the small, elementary surrounding schools. She noted that it was important to remember the diversity within our state, and that there isn't a one-size-fits-all solution for Montana.

Eric Feaver, stated only one-fourth of the school districts exist today compared to fifty years ago, acknowledging a historical process of school consolidation in Montana. He felt the purpose behind the consolidation movement was to try to make a political determination as to how best to organize public schooling in the state of Montana so that it makes sense to everyone involved, including the general public. He mentioned the 500 different taxing jurisdictions in schools alone, creating 500 tax bills in which taxpayers pay inequitable amounts. This had the most impact in MEA's decision to support K-12 consolidation as an attempt to equalize state funding for education and, in the process, to meld those 500 districts into a more manageable 175.

One minute summary, concluding remarks:

Bob Anderson again asked the press to be factual and to study past reports on consolidation. He believed that teachers unions would be big winner if there is K-12 unification. He was concerned about the Governor's Task Force's suggestion to eliminate tuition fearing that it might not create more choice, as they had hoped. The task force should realize it is a taxpayer's issue, and one to deal with cautiously.

Paula Butterfield said that as a member of the Governor's Task Force she was attempting to keep an open mind. The committee has heard a lot of good discussion and she invited the audience to future task force meetings.and said that there would still be opportunity for input.

Eric Feaver acknowledged that it would be advantageous to the teachers unions to have K-12 consolidation, but even more of an advantage to the teachers in small rural schools who are still making very low walaries after thirty years. He believes that the bottom line is money--how we raise it and how we spend it. Public schools look like they raise a lot of money, they spend a lot of money, and they aren't spending it wisely. Schools have to turn that around in some way. Consolidation is one way to address that issue.

Loran Frazier said that to look at the politics of consolidation is to realize that we are part of representative government. If the same representatives with the same attitudes come back that we have had in the past, he doesn't believe there will be big changes. However, he does think the issues of tax credit, tuition vouchers, and the state governance may be brought up at the next legislature. He further went on to state that the idea that business can do better at running schools is not being born out in Baltimore. The five privatized schools are spending more money on the students and the test scores are poorer. He does believe that the legislature is compelled to reorganize something, and education could be part of that.

Eric Newhouse felt that the subject had been covered.

AN OVERVIEW OF THE PROS AND CONS OF SCHOOL CONSOLIDATION

Dr. Paul Theobald
Assistant Professor at South Dakota State University
Brookings, SD

Dr. Theobald began by describing two views held throughout this century, consolidation and efficiency. He explained how both views have shaped, and are currently shaping, economic arrangements, politics and education. He believes they have become a taken-for-granted part of our philosophy along with the assumption that they are inherently good and that anything more efficient is better than something else that's less efficient."

He used Henry Ford's assembly line as an analogy of efficiency in economics describing the labor system as becoming so specialized, from efficient streamlining, that human labor improved right out of existence. The volume and quality of autos increased because of efficient production techniques, but the number of employees decreased. "I believe it has taken us decades to discover that efficiency is a double edged sword."

Dr. Theobald went on to point out that politics is shaped by this cultural standard of efficiency in the form of centralization. He stated that efficiency demands bigness, and that as government becomes more efficient it becomes less and less responsive to the people who give it license to exist.

Efficiency in education has created bigger schools and more sophisticated techniques in determining a student's future. He explained how the term "comprehensive public high school" had replaced the term "common school" and how this continuation of streamlining has affected students. Competition between students and between schools, as part of our cultural assumption of efficiency, has produced educationally turned off students. Dr. Theobald said that the emphasis on efficiency in education made the whole enterprise a win/lose affair. Some students win, some students lose, and those who lose do not like the system.

Dr. Theobald described the price that efficiency has cost in our culture (unemployment, violence, abuse, pollution) and suggested that if these aspects of our current culture did not exist, then the price of efficiency would not be considered too high. He assured his audience that he did not want the rural past idolized, because there were many problems with it. However, he didn't want the rural teacher and students sacrificed in the interests of urban and suburban prosperity, either. He explained that the commitment to put a school within walking distance of every child with our resources and technology today is very possible,

but it would entail a shifting of priorities. He depicted similarities between the current health care reform movement and school consolidation. For those who can't afford health care coverage, and those in the furthest reaches of the district, the system is not working very well. He stated that decisions are often made by those who have wealth and power and by experts rather than the people whose lives the decisions affect.

Dr. Theobald concluded by pointing out some pros for consolidation: inter-scholastic athletic competition; real versus TV teachers; and a larger variety of curriculum. He added that consolidation of schools would be fitting into the principle of efficiency, and reminded his audience that efficiency is a double edged sword which enables us to do some things well, but it makes us do other things more poorly.

TABLE TOPICS

During breakfast Thursday morning, participants were encouraged to join table discussions of their choice on specific consolidation issues. There were three topics: K-8 Issues, Small K-12 District Issues and County Superintendents' Issues. These topics were ably facilitated by John Babcock, Carl Knudsen and Dottie Donovan, respectively. Unfortunately, because they were occurring simultaneously, it was impossible to collect and summarize these discussions.

FORCES SUPPORTING CONSOLIDATION AND SOME ALTERNATIVES

Dr. Paul Theobald
Assistant Professor at South Dakota State University
Brookings, SD

Dr. Theobald began his address by explaining that philosophy really deals with three pivotal questions:

1. How will we govern ourselves?
2. How will we meet our needs?
3. How will we educate our youth?

He went on to state that he believes that all three are intertwined and are asked by all people. Historically, liberalism is the term used by the industrialized west to answer these three questions. In the historical, philosophical sense, this term, according to Dr. Theobald, has meant:

> "...some type of representative government, some type of economic arrangements that maximizes the freedom of accumulation, and some type of education that legitimized the pursuit of truth rather than preparation for an occupation."

He continued his address by reviewing the main points of his previous speech, "An Overview of the Pros and Cons of School Consolidation" (efficiency becoming a taken-for-granted part of our philosophy and an assumption that it is inherently good) and described how this assumption became part of our culture. Dr.Theobald explained that the ancient Roman and Greek civilizations had "pre-liberal" answers to the three questions. This classical world view supported "communal orientation" in comparison to the liberal view which supports "individual orientation". Some thinkers contribute this change to the ascent of Christianity; salvation of your own soul pervaded western culture, putting the focus on the individual rather than the community.

Later, in the 17th and 18th Centuries, John Locke, Jean Rousseau, and Thomas Jefferson contributed new answers to the three pivotal questions. Dr. Theobald believes this is when modern liberalism began to form. Individual equality helped promote a representative government and, combined with free education, allowed equal opportunity for economic prosperity. He compared the terms "virtuous" and "successful" as compliments, the first indicates an individual's relationship with others within a community; the second indicates an individual's pursuit of his or her own interests. This change in philosophy led to competition,

and Dr. Theobald asserts that Charles Darwin's, "survival of the fittest", accelerated it into all aspects of our culture and gave rise to the efficiency culture. He went on to point out that with competition, there will be winners and losers, and asked what's to prevent the losers from taking out their disappointment on the winners?

By using a variety of procedures, schools help socialize our youth and are part of the decision-making process concerning their placement. Dr. Theobald believes that schools today reflecting this efficiency, liberal philosophy and are producing winners and losers. He pointed out that in recent times we have taken to calling the winners 'gifted' and the losers 'disabled'. He stated that on the other hand if a communal orientation was part of the ascendent answer to the three pivotal questions, our schools wouldn't operate the way they do and we would not be discussing rural school consolidation today. He cited the mayor of Missoula, philosopher-politician Daniel Kemmis' book titled, *Community and the Politics of Place*, as a voice for supporting a move towards a more communal orientation.

He went on to explain how large multinational corporations have been given rein to prosper as though they were individuals and in the process have taken equality and opportunity away from citizens. He contended that consolidation is being pursued, not because some law of nature is at work that says rural communities must get smaller, but because some decisions have been made rather than others that might have been made. According to Dr. Theobald, rural schools can and should serve their community in contributing to an awareness that, like the government, citizens allow corporations to exist. Without relinquishing individual advancement, rural schools can serve their community in new ways and help stop the belief that success is obtain somewhere else.

Dr. Theobald concluded his remarks by suggesting that rural citizens need to band together to become a force in government and to force a change in federal priorities, so that less money is spent on international corporations' needs and more on rural people. Also, at the state level there needs to be more creative input toward financing of schools. Rural people are increasingly being robbed of the opportunity to lead a life with dignity, and Dr. Theobald believes that it is tremendously important in how we measure what we do with rural schools in terms of whether we're contributing to the development of citizens or trying to become more efficient.

CHANGING ROLES AT THE COUNTY LEVEL

Mary Ann Brown
Gallatin County Superintendent of Schools

Jerry Scott
Carbon County Superintendent of Schools

Rachel Vielleux
Missoula County Superintendent of Schools

Dorothy Laird
Flathead County Superintendent of Schools and a
member of the Governor's Education Committee of the Task Force
to Renew Montana Government

Dr. Lee Spuhler,
of Western Montana College, Moderator

PRESENT DUTIES:

Mary Ann Brown, citing the Montana statute 20-3-205 titled, "Powers and Duties of the County Superintendent", explained some of the duties of a county superintendent. These include: assisting districts with their budgets, reviewing boundary lines for school districts, answering financial questions, and assisting the Office of Public Instruction (OPI) with transferring of reports. She also listed additional duties a superintendent carries out such as: answering public questions including anonymous calls; writing articles for newspapers; writing grants; screening for pre-school and kindergarten; and attending special education CST and IEP meetings. Superintendents also participate on numerous state committees, sit on boards of directors for various co-ops and consortiums, and are accounting clerks for smaller school districts. Ms. Brown concluded that county superintendents are buffers between the community and the schools, helping to maintain a balance.

PRESENT DUTIES AND SUGGESTIONS FOR CHANGE:

Jerry Scott, took his presentation from a newspaper article he had written earlier this year titled, "We Can Give You Something For Nothing." It summarized a meeting held by the Montana Association of County Superintendents of Schools. One of the topics discussed at the meeting was a proposal for the elimination of

the county superintendent's office. The conclusion was that this elimination would not provide more money to the state or to the schools. The county superintendents felt many of their jobs were being duplicated by OPI but could be better performed at the county level saving the taxpayers dollars and also generate more local control and local trust. Some of these duties included: transportation, distribution of funds, helping with accreditation, and becoming a center for the fall reports and other paperwork as well.

PLANS STREAMLINING THE SYSTEM OF COUNTY SUPERINTENDENTS:

Rachel Vielleux, describing the relationship between the state legislature, OPI, and the county superintendents, referred to the 1993 Legislative Session where attempts were made to eliminate some of their duties and the office, itself. Educators often felt defensive with the legislature in the past. However, the Montana county superintendents decided not to be defensive, but rather take a pro-active stand towards the next session in 1995. This past year, groups of county superintendents met and discussed three general topic areas:

1. What duties are artifacts from the 1864 era and are no longer needed? One example is the current procedure of registering all teaching certificates, which is tedious and no longer needed. By eliminating this duty it would place the responsibility with local districts who are responsible for their teachers.

2. What duties can be changed to become more effective and/or efficient? An example of this is the disbursement of monies from the county, state and local levels for transportation. Districts would send their bus route information and individual transportation contracts to the county transportation committee for approval. The county superintendent would calculate the reimbursement due from the state and submit this list to OPI for payment to the districts, thereby greatly reducing the unnecessary transfer of paperwork among levels of government.

3. What new jobs could be done to benefit the district and in some cases benefit the state? OPI is no longer able to go out in the field for accreditation reviews. By substituting for OPI, county superintendents could go to local districts to verify the information that certifies them as an accredited school and entitles them to receive state money.

Ms. Vielleux stated there are many other examples describing how the role of county superintendents can grow and change to match and enhance the changing structure of education in Montana.

GOVERNOR'S TASK FORCE:

Dorothy Laird, explained the purpose of The Pipeline, an educational sub-committee of the Education Committee of the Governor's Task Force. Their assignment was to look particularly at the roles of the county superintendent of schools and the county treasurer as they fit with education in Montana. They considered that what Montana might want to do if it really wanted to renew, not just eliminate, is to look at the idea of regionalization of some duties. She focused on some of the things the State Board of Public Education needs done: accreditation, PIR approval, and certification. One idea she suggested was that the State Board of Public Education have a field person paid partly by state, county and local school district monies; and if a school had no certified administrator and needed those services, this regional service concept would provide it for a fee. Ms. Laird stated that after many discussions, the Education Committee ultimately recommended the elimination of the position of County Superintendent of Schools.

FINAL COMMENTS ON THE ISSUE--LOOKING THE DRAGON IN THE EYE-SCHOOL CONSOLIDATION PROS AND CONS:

Each speaker looked at their own County schools.

Rachel Vielleux stated that when we look the dragon in the eye, it is an eight eyed beast and each eye has a little different character. What would be good for Mineral County made absolutely no sense for Missoula county. K-12 consolidation in Missoula county would include 12,000 students ranging from 20 miles away in one direction to almost 100 miles in another, with a centralized office in Missoula. There would be no buildings closed, except for possibly one. Efficiency and savings won't occur. It may cause nothing but misery. She concluded that the current unification of Missoula School District No.1 and Missoula County High School may set the standard for horror stories to come and many of them will come before the upcoming legislative session.

Mary Ann Brown said that there are four, one-teacher schools left in Gallatin county, and they would be closed if county consolidation takes place. Two of the small districts would come into Belgrade which wouldn't notice the addition of the possible thirty students. This will be a savings to the state, but two rural teachers

are possibly going to lose their jobs. "Do we keep the school open to keep the teacher employed?"

Jerry Scott said that in Carbon County there are two rural schools which could be consolidated and closed at this time. Two others could remain open and become part of a larger district because of the present cooperation with busing. None of the other schools in Carbon County could accommodate all the students from any other school. There is just not enough room.

Dorothy Laird said that seven years ago Flathead County had 21 school districts. Now there are 19, with one consolidation and one annexation. In the Flathead the population is increasing fast and the schools are bulging at the seams. No buildings could be closed. She wants the decisions on education to be made by the "local community."

IDEAS/OPTIONS FOR CHANGES--Opportunities for Participants to Determine Changes That Might Work in Their Schools

Facilitator - Dr. Joyce Ley
Northwest Regional Educational Laboratory
Portland, Oregon

Dr. Ley, a former Montana educator, began by describing the Northwest Regional Educational Laboratory's role with educators and their role with it. She is involved with the Lab's Rural Education Program, which is one of ten programs at the Lab. Dr. Ley provided the annotated bibliography on consolidation which was found in the Conference packet. The Lab will send the requested articles if people fill out the enclosed request form.

The workshop participants were asked this question, "What do you, as an individual, think is the ideal structure for Montana schools?" They were given ten minutes to reflect and write down some answers. Then the participants were randomly placed in small groups and began by sharing their ideas around their table. Next, they were to try to achieve a consensus on one to three concepts. After reaching a consensus, they were to write them on a poster board for display and discussion with the entire workshop group.

Some issues brought up by the groups included: telecommunication, transportation, regional areas, site-based counselors, expanded school years, aggressive public relations, local governance, shared costs, and non-mandated consolidation.

Editor's note: A summary of the results of this section will be available later from the Rural Education Center.

K-12 UNIFICATION--PROS AND CONS

Gregg Groepper, Assistant Superintendent
for the Department of Operations,
Office of Public Instruction, Helena

Craig Brewington, Superintendent
of Hellgate Public Schools, Missoula

Gregg Groepper focused on some of the reasons why schools get so much criticism from both the public and the legislature. He believed that the main underlying factor is that only about 27% of the registered voters in our nation have children in school, leaving 73% who do not. He asked the audience to assume the perspective of a neighbor living on a fixed income who wonders why his or her taxes were so high. Next, he explained how the budget of a school district can have as many as 19 different financial funds with their own revenue sources and their own separate accounts. Out of 495 elementary and high school districts in Montana, there are only 60 elementaries and high schools with co-terminus boundaries which could unify under present law. All the others have to have duplicate budgets and their mill levies will be different.

Mr. Groepper used the Helena district as an example to show how school mills are determined and how it affects the taxpayer. The Helena area has six school districts, five elementary and one high school, with six times the 19 budgets, all of which the county treasurer, the district superintendent, the state people, and the other districts have to pay attention to. He continued by explaining what this means in terms of statutory duplication: five elementary school boards, five sets of education policies, and five textbook adoptions. In terms of inefficiencies: six tax jurisdictions, six budget units, five superintendents (because Helena elementary and the high school have been unified), five business offices, six insurance pools, and six special education programs. In terms of inequalities: five different elementary educations, but all students going to the same high school, and taxpayers in five different parts of the high school district paying five different amounts of taxes on property worth the same amount. In terms of state government impact: each school district has to have a separate audit because they have a separate funding structure. There are also six separate-unemployment accounts, teacher retirement accounts, PERS accounts, Workers Compensation accounts, with-holding entities, and investment plans. Then he asked the audience to apply this Helena example to the state of Montana with its 495 budget districts, which include 357 administration districts and 31 K-12 districts.

The purpose of his presentation was to explain how the merging of elementary districts with their respective high school districts into K-12 districts can

make sense to the 73% of the people who don't have children in school, whether it saves money or not. He continued that in the new K-12 district all the taxpayers would pay the same education mills. He said that there was no reason to have to move schools or to close schools, all that must be done is to redraw the boundaries of all those districts so their taxable value is the same.

Mr. Groepper went on to explain that a benefit to educational equality would be one consistent education policy among the five elementary districts. Pointing out what Ms. Butterfield said about one size does not fit all, he applied this towards a movement for 164 K-12 districts, eliminating 330 districts, and resulting in a savings. He believed that if the state were to do this K-12 unification students, teachers, county assessors and treasurers, high school boards and clerks, and the tax payers all win, but elementary superintendents, clerks and school boards would lose.

Craig Brewington began by explaining that Missoula Elementary School District No.1 is currently in the process of unifying with Missoula County High School. Another proposal has followed which was to unify the entire county, minus Frenchtown because it is a K-12 co-terminus district. Mr. Brewington, along with others, put together a study patterned after Paula Butterfield's study in the Gallatin Valley. The purpose of the study was to outline the costs and/or savings that would result from such a county-wide consolidation. He presented the results of the study, covering the model used, the assumptions adopted based on current information, and the proposed costs and savings to the district and to the state.

There are no savings to local taxpayers in consolidating/unifying the school districts in Missoula County, except when buildings are closed. Quite to the contrary, when the Basic Entitlements and Guaranteed Tax Base payments are not made by the state, but transferred as obligations to the local level, taxes rise significantly.

There are no savings in personnel costs at administrative levels. Central office personnel would have to be increased to assume the additional duties required to manage the additional facilities, personnel and students.

There are significant cost increases associated with placing personnel of consolidated districts on the salary schedule of the largest district. This phenomenon makes consolidation/unification virtually impossibly to manage when budgets are capped and/or decreased.

There is no apparent immediate benefit to students with such a consolidation/unification. It can be argued that the addition of two Gifted and Talented personnel would/could be of benefit to some of the brightest students, but

there are services and programs in consolidating schools that others would argue are just as effective and of as much benefit to the students. There is the possibility that the disparities in course offerings for students in grades 6-8 would be leveled in the not-so-distant future once all students were in the same district, depending on parental demands, the availability of funds and the determination of the public.

It is evident from this study that the State of Montana might realize a savings of approximately two million dollars ($2,000,000); but in order to maintain the present educational opportunities for students, the tax burden would need to be absorbed by the Missoula County taxpayers, if they approved a mill levy.

He concludes by stating that, according to their study, in Missoula County there would be no money saved and, in fact, school consolidation would cost money, so it would be difficult to sell to the tax payers. Even with the study, he was concerned that the taxpayers will believe the myth that it will save money, go ahead and support unification and then be angry because it didn't save them money.

Editor's Note: Copies of the Missoula County Unification Study are available from the Rural Education Center.

OTHER VIEWS ON CONSOLIDATION

Jeff Baker
Commissioner of Higher Education

Storrs Bishop
Rancher, Insurance and Real Estate Agent in Ennis and a
member of the Governor's Task Force to Renew Montana Government

George Bailey
Superintendent of Target Range Schools, Missoula

Chuck Swysgood,
State Senator, Senate District 37

Kelly Elser
Mayor of Sheridan

Dr. Claudette Morton
of Western Montana College, Moderator

Jeff Baker, described a re-occurring theme in higher education: collaboration. He felt this was a response to recent trends developing throughout Montana such as: increased student enrollment, small scale facilities, and limited resources. Higher education is now working at moving students through the system in the shortest time possible while still being able to meet the needs of the future. He stated that this is not a new issue focused on because of the Governor's Task Force, but an issue stemming from current and future needs. While he conceded that he did not know a lot about consolidation of K-12 schools, he said he is learning about how higher education and K-12 can work better together. He believes this is an opportunity which offers great benefit to the students of the state.

Storrs Bishop, addressed some of the myths or misconceptions associated with school consolidation such as; too many districts, losing local control, and losing community identity. He felt that the number of districts in Montana creates more opportunity for parental involvement and for local control which contribute to involvement, collaboration, and input from the local citizenry. He reminded everyone to remember the local boards who will be facilitating the policies generated and to pass on good, sound, hard facts and information so that they can make wise decisions for the benefit of their communities. He also stated that the real bottom line is "how is it going to affect the students under our charge." He felt that there was plenty of room for improvement, but that not all reforms on both

state and national levels are necessary, or apply to Montana, or would be looked upon favorably here. He concluded that there were a lot of things we could be doing better, and there were some things that we should maintain and retain from our past.

George Bailey, pointed out some questions the issue of consolidation raises and offered some answers. What do we want to accomplish-save money? Then the obvious thing to do is home school every child in Montana and save a billion dollars. Do we want to increase the average teaching salary across the state? Then we can devise a plan, either a state-wide salary schedule or one big statewide district. Do we need county superintendents? If we don't, how will the work they are doing be done and who will pay for it? He stated these are good questions and need to be asked, along with many others. He agreed with Jeff Baker that a proposal for the merger of the governance of K-12 and higher education will be announced in the near future. He said that education seems to be cyclic and he believed that before he retired from education there will be discussions on the pros and cons of decentralizing the system. He concluded that it was good to be asking the questions.

Chuck Swysgood, recalled his personal experience as a student during his high school's consolidation. He remembered the bitterness associated with it and yet how only four years after the fact nobody ever knew consolidation had taken place. He felt the end result was a better school. He did say that the consolidation of his school was not forced. The school boards made the decision. He went on to point out that there had been many attempts by the state legislature to address some form of consolidation/unification as it related to the schools of Montana. He stated that he had never and probably never will support mandated consolidation. He believes it is a local issue where school boards, which are elected by the people, know the local situation and what is needed should decide. He cited statistics which helped explain the diversity of the state and how difficult it is to arrive at a single answer for all. He concluded that if consolidation could provide a better quality education, enhance the delivery of that education, and maybe hopefully save taxpayer's money, then it should be considered.

Kelly Elser, stated he was against consolidation, as a matter of economics, identity, and politics. He believed that a community is tied to its children and revolves around its schools, and that to take away a town's school causes it to lose its identity. He felt that consolidation was a preliminary step towards state control, and that there was an advantage to local control. It is easier to get the attention of local leaders than state leaders when it comes to local issues. In his area, the schools are the largest employer affecting the community's economy. The school boards of Twin Bridges and Sheridan went together and hired an outside consultant to determine the feasibility of consolidating schools in their area. From the consultant's report came a list of 17 items to be considered in a district

before consolidation occurs, which he shared with the audience. (List follows) He concluded that the general public tends to think consolidation is fine as long as it's not their school which is being consolidated.

Items to Be Considered by Both Districts*

1. Will consolidation improve the educational program for children and young people?
2. What cost savings could be expected?
3. What additional costs could be expected?
4. How will physical facilities be utilized?
5. What special problems will be presented in transportation?
6. How will present staff be affected? What are the legal provisions?
7. If consolidation takes place, what would be the name and mascot of new school?
8. Where would games be played? Where would plays, concerts and programs be presented?
9. Are the philosophy and objectives of both school districts compatible with a consolidation?
10. What is the possibility of enrollment increases in both districts in the future?
11. Will taxable valuations decrease or increase in the future?
12. What is the possibility of new business and industry developing in the area?
13. Are all cost factors being considered?
14. What special advantages would consolidation offer?
15. What special problems would consolidation present?
16. Would consolidation make additional needed education programs possible?
17. What will be the effect of school locations and grade levels on foundation program?

*From feasibility report by outside consultant for school boards of Twin Bridges and Sheridan, Montana.

SOME CONCLUDING THOUGHTS

Ted Schwinden
Former Governor of Montana
Author, "School Reorganization in Montana:
A Time for Decision?
1993 study commissioned by the
Montana School Boards Association

Governor Schwinden began by referring to his Project Seeds Report, "School Reorganization in Montana: A Time for Decisions?" and used it as an explanation of his views concerning the dragon: school consolidation. He did say that, though he might make some minor modifications in the report, he would still defend the recommendations and options.

First, he expressed his enjoyment of the last three days, the studies, panels and presentations. The county superintendents panel provided, "some very valuable input", and he would have liked to have had Paula Butterfield's and Craig Brewington's studies when he was doing his report. He believed, even though others were criticizing it, Gregg Groepper's report would be very persuasive if presented across the state, mainly because high technological presentations can be persuasive and people are conditioned to receive messages in this way. He also commented about Jeff Baker and the changes he is implementing with the cooperation of the university system; looking at education as a K through forever. He believed that if Dr. Baker, with his open-mindfulness, "...had been the commissioner of higher education in 1981, forty percent of the problems the university system has faced in the last five years would not have been there."

Governor Schwinden said that he was deeply troubled with many social, political and economic trends developing in America, including school consolidation and other issues brought up during the conference. He used the recently televised flight of O.J. Simpson as an example of his belief that American society has become obsessed with sensationalism; that it is obsessed with media time and the trivia of life, and that people spend time watching, focusing their attention on scandal and news trivia and wonder why their lives are getting worse. He cited an article in the *U.S. News and World Report* (April, 1994), about the annual National School Boards Association meeting, which said that one-fourth to one-third of all school board seats are vacated each year because the board members either leave during their term or do not run for another term. Governor Schwinden wanted to know if highly confident, qualified individuals like Paula Butterfield and others attending the conference would not run for public office then who would? "Where are the virtuous candidates Paul Theobald talked about the other night? How do you find those people and attract them?"

He stated that almost everyone at the conference had focused on money as the problem, but he argued that accountability, responsiveness and trust are the real problems. Restoring accountability to those who spend public dollars and responsiveness from those who ask for public trust is what must be done.

"I am convinced that the erosion in public trust of our institutions, including education, will, unless it is reversed, ultimately result in a public insistence that creates a new political regime or order in America, one that places order above liberty and stability above freedom." Governor Schwinden stated that this is the inevitable future of people who decide they are no longer comfortable in the society they live in. On an optimistic note, he said he felt this was a long way in the future.

According to Governor Schwinden, consolidation is a peripheral issue if our first concern is the quality of the product delivered to our youth throughout the educational structure. He mentioned other issues concerning quality that need to be addressed throughout our country such as: teacher remuneration and preparation; the length of the school year; effective utilization of capital investment in school structures; and rapid adaptation of technology. Acknowledging the issue of testing is controversial and not definitive, he believes if accountability and trust are to be restored, some type of performance result is necessary. He noted that the concepts of shared programs and other activities people are implementing at cost savings to the schools may be part of the answer, but that these must be done with higher student satisfaction, preparation and involvement.

APPENDICES

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